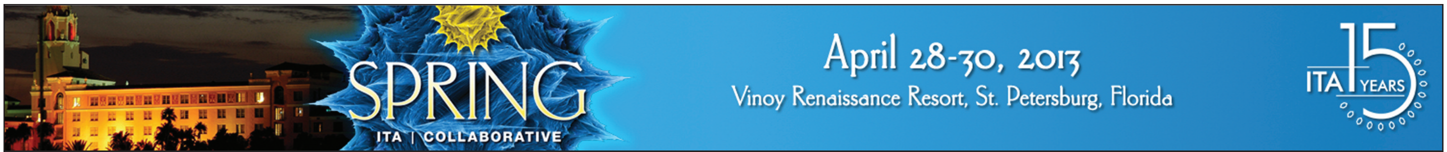


Saturday, April 22

7:00PM - 10:00PM	Optional Dinner at 400 Beach Seafood & Tap House

Sunday, April 28

8:00AM - 4:00PM	Optional Golf and Tours
3:00PM - 8:00PM	Registration | ITA Online Station
5:00PM - 8:00PM	Vendor Party & ITA Ignite - Vinoy Grand Ballroom, Lobby Level
8:00PM - 11:00PM	Dinner on Own | Various Vendor Events

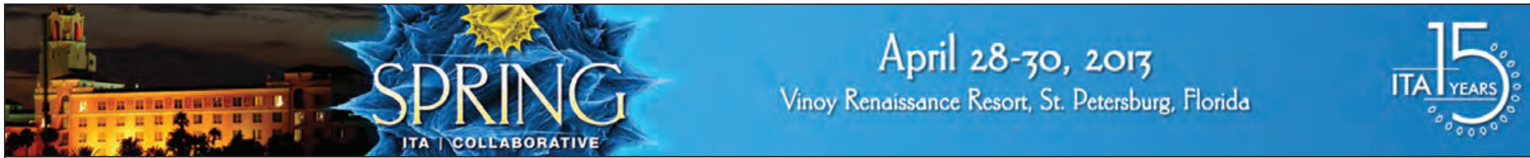
Monday, April 29

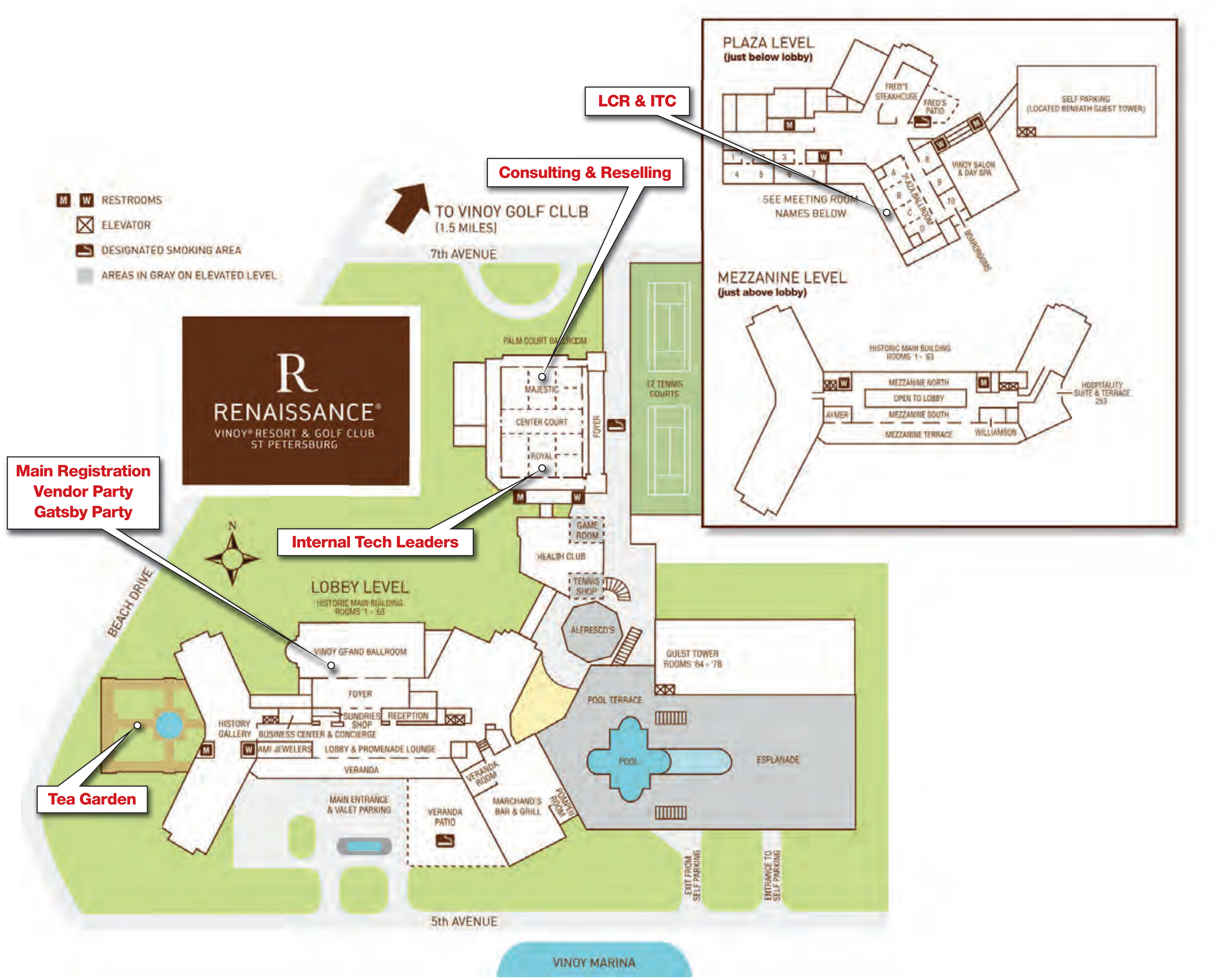
7:00AM - 7:30AM	Registration | ITA Online Station
7:30AM - 8:00AM	Keynote Breakfast - Vinoy Grand Ballroom, Lobby Level
8:00AM - 9:30AM	General Session - Welcome and "The Great Escape: Break Away from the Pack with Compelling Anecdotes" - Vinoy Grand Ballroom, Lobby Level

5 TRACKS Rooms Unless Otherwise Noted	Consulting & Reselling (CR) Monday & Track 1 Tuesday Palm Court - Majestic 1-2	Consulting & Reselling (CR) Track 2 Tuesday Palm Court - Majestic 3	CR Special Interest Groups Large Firms & Infrastructure Plaza Level, Main Building	Internal Tech Leaders (ITL) General & Tactical Palm Court, Royal 1-2	Internal Tech Leaders (ITL) Strategic Palm Court, Royal 3
9:45AM - 11:00AM	DIFFERENTIATE OR DIE WORKSHOP			Virtual Desktop (VDI) & BYOD: Revisiting VDI Options With The Increasing Demands of BYOD	Four Views of a Single Truth: How to Read, Speak and Persuade Any Audience
11:15AM - 12:30PM				What's Happening in My Practice Roundtables	Strategic Roundtables - Session I
12:30PM - 1:45PM	Luncheon - Mezzanine, Main Building				
1:45PM - 3:00PM	DIFFERENTIATE OR DIE WORKSHOP			Securing the Human: Developing Next Generation Security Awareness Programs	
3:30PM - 4:45PM				Contract Risks in the New SaaS World: The Art and Science of Negotiating SaaS Deals	
5:00PM - 5:45PM					
6:00PM - 10:00PM	Gatsby at the Vinoy: A Swell Affair With a 20's Flair - Cocktails in Tea Garden at 6:00 PM | Vinoy Grand Ballroom, Lobby Level at 7:00 PM				

Tuesday, April 30

7:30AM - 8:30AM	Full Breakfast - Vinoy Grand Ballroom, Lobby Level | ITA Online Update					
8:30AM - 9:15AM	How Project Management/PMO Can Increase Your Company's Effectiveness and Revenue	Avoid Excel Hell with Real Time Reporting	CR Large Firm Group: What's Happening in My Practice Plaza A-B Main Building, Plaza Level	CR Infrastructure Group: What's Happening in My Practice Plaza D Main Building, Plaza Level	Thomson Reuters Roadmap Town Hall Meeting	
9:30AM - 10:15AM	Building Partnerships that Work . . . And Last	Can Niche Marketing Really Make a Difference?			CCH Roadmap Town Hall Meeting	
10:30AM - 11:45AM	Successfully Adding a New Product Line	Metrics That Matter			What's Happening in My Practice Roundtables - The Drill Downs	Strategic Roundtables - Session 2
11:45AM - 1:30PM	Luncheon & General Session - Inspector Gadget - Vinoy Grand Ballroom, Lobby Level					
1:30PM - 2:45PM	How Empowering Greatness in Others Will Allow You To Achieve Greatness Yourself	Solving The Mystery of Packing Your Pipe With Prospects			Developing Roadmaps for Key Constituents: Tax, Assurance and Consulting	Business Intelligence and Big Data Strategies - Providing Useful Data and Gaining Adoption
3:15PM - 4:30PM					Managed Services	
4:45PM - 5:00PM	Consulting Wrap Up				ITL Wrap Up	





ROOM LOCATIONS

IGNITE ITA! And Vendor Reception (Sunday)
Vinoy Grand Ballroom, Lobby Level

Registration, Breakfasts, General Sessions
Vinoy Grand Ballroom, Lobby Level

Consulting & Reselling Workshops (Monday)
Palm Court Ballroom, Majestic 1&2, Plaza Level Access

Consulting & Reselling (CR1 Tuesday)
Palm Court Ballroom, Majestic 1&2, Plaza Level Access

Consulting & Reselling (CR2 Tuesday)
Palm Court Ballroom, Majestic 3, Plaza Level Access

Internal Tech Leaders (ITL - Tactical)
Palm Court Ballroom, Royal 1&2, Plaza Level Access

Internal Tech Leaders (ITL - Strategic)
Palm Court Ballroom, Royal 3, Plaza Level Access

Large Firm (LCR Track Tuesday)
Plaza Ballroom A&B, Plaza Level Access

ITC Firm Special (Tuesday)
Plaza Ballroom D, Plaza Level Access

Gatsby at the Vinoy: A Swell Affair With a 20's Flair (Monday)
Cocktails in Tea Garden
Vinoy Grand Ballroom, Lobby Level

GENERAL SESSION

The Great Escape: Break Away from the Pack with Compelling Anecdotes

Memorable speakers are great storytellers. They understand the power of narrative. They know how to frame content, provide obstacles and incorporate vivid details to keep listeners engaged. In business, relating case studies demonstrates how you operate and deal with challenges. The listener identifies with the characters, puts themselves in the scenario and better understands what it took to solve the problem. Eloqui performance techniques feature a unique template to structure content to make technical information come alive and to keep an audience's attention, from a compelling open to a satisfying close. Narrative is a powerful tool for persuasion. In this presentation, Eloqui co-founders Deborah Shames and David Booth will deliver practical tools with immediate application on how to persuade rather than educate any audience. You will learn how to:

- Identify and achieve one primary intention in a client/customer/peer interaction
- Construct and deliver persuasive anecdotes
- Organize content to drive action
- Speak in a compelling, authentic voice
- Change from speaking in generalities to specifics; adding your perspective rather than leaving yourself out of the narrative; and becoming memorable, not forgettable

David Booth - Eloqui, Calabasas, CA
Deborah Shames - Eloqui, Calabasas, CA

Inspector Gadget Returns!

Always on the lookout for the latest tech toys and gadgets poised to hit the market, Inspector Gadget is back again to share his latest findings, along with insights on how these cool little devices will change the way we work! From productive and essential to fun and frivolous, there's a tech tool in this session for everyone!

David M. Cieslak - Arxis Technology, Inc., Simi Valley, CA

CONSULTING & RESELLING (CR) TRACK

MONDAY CR INTERACTIVE WORKSHOP

Differentiate or Die!

What will be the future for us as consulting service providers and business owners? There are only two things that are certain: there will be a future and the future will look different than today. For our members who cannot adapt to the future, create value for customers and establish a sustainable value, there is a risk of not surviving. As technology becomes more of a utility in a cloud focused, Software as a Service (SaaS) world, our clients are demanding less installation expertise and more business expertise. And this is only one of the changes. Changes in our revenue models, changes in our workforce, and other external factors have caused us to realize that it isn't "business as usual" and we need to create business models that allow us to thrive in this new business landscape.

Our Monday CR track has been designed as a full day workshop to tackle this important topic. We will leverage the creative brainpower of outside experts and our ITA membership to help us examine how we need to adapt. Using an interactive approach, we will challenge you to glimpse the future, work in small groups to brainstorm solutions, and in true ITA style, share those solutions. We can leverage each other's collective expertise to not only be survivors in the future, but able to differentiate our firms to thrive and lead our customers to the solutions they need.

Our workshop format will be as follows:

- Welcome and General Session
  - Led by Steve Epner with perspective on how business is changing and how these changes will impact our business
- Interactive Topic Discussions
  - Following the general session, the workshop will include three topics for interactive discussion. All three of our interactive topics will follow a format of:
    1. Initial presentation and discussion of topic (30 minutes)
    2. Individual facilitated table discussions (25 minutes)
    3. Selected table report outs (20 minutes)
- Interactive Topic 1 - Future IT Firm (FIT Firm) – Steve Lipton
  - This topic will focus on business model options for building the FIT Firm. Product and service strategies, geographic strategies, industry strategies and other alternatives will be discussed.

- Interactive Topic 2 – FIT Firm Customers: Who are they, how do I get them, and how do I keep them engaged? – Geoff Ashley
  - Your customer focus may change based on the business model(s) you have selected for your FIT Firm. This topic will not only deal with generating new customers, but keeping the customers that you already have. We'll examine success and failures and come up with ideas for maintaining a healthy and profitable customer base.
- Interactive Topic 3 – FIT Firm Culture: Engaging Employees to Achieve their (and your) maximum potential. – Terry Petrzelka
  - Similar to customers, your employee strategies may change as a result of your business model. In any case, our members need to examine and recognize their current employee culture and determine if changes are needed to build a high performance team and firm. How do you get your jobs done, have fun and get the buy in from your staff that supports your mission?
- Wrap Up – Your FIT Firm Plan: We'll discuss what we learned by working together for the day and will provide some tools and ideas on how you can take your experience back to your organization to build your FIT Firm.

Geoff Ashley - PROe, Bedford, NH
Steve Epner - Brown Smith Wallace Consulting Group, St. Louis, MO
Terry L. Petrzelka - The Petrzelka Group, Fountain Hills, AZ
Steven P. Lipton - Wipfli LLP, Madison, WI

TUESDAY CR BREAK OUT SESSIONS

Avoid Excel Hell with Real Time Reporting

In this session, we'll discuss the various methods of producing reports within Microsoft Excel and best practices for converting your financial or project spreadsheets into real time data. Spend more time analyzing versus aggregating your information with a 3-step "Connect, Analyze, and Take Action" approach, all while saving you time and strengthening your role in your organization. We'll also discuss the ability to minimize efforts in monitoring your budget and recognize early warning signals. Join us for this valuable session and gain insight into critical information within your organization today.

Denise Hutchison - BizNet Software, Inc., Dallas, TX
Pete Reynolds - BizNet Software, Inc., Dallas, TX

How Project Management/PMO Can Increase Your Company's Effectiveness and Revenue

Every professional services firm faces two challenges – how to become more efficient operationally while at the same time increasing billing revenues. Led by PMO and professional services expert Lynne Davidson, this session will prepare you for the strategic and tactical decisions in planning, launching and operating an internal project management or PMO initiative that is operationally sound and a competitive advantage for your business. Additionally, Lynne will share the details on how a project management and PMO practice can accelerate your revenue and profits. Specifically, this session will cover these important topics:

- How to design your project management/PMO for success, before launch
- Setting up and monitoring the key project metrics
- Proven strategies for risk mitigation and change management
- Why a project management offering can be a great source of new revenue for your services business
- Tips for a successful PMO/project management practice

Lynne Davidson - KeyedIn Solutions, Minneapolis, MN

Building Partnerships That Work . . . And Last

Partnerships make all of the difference in your business. In fact, who you partner with and how you partner can be a significant differentiator for your company. The truth is that most partnerships are dysfunctional, one sided, don't last, or never really get started. This session will get to the heart of the matter – what makes partnering so hard? How can you make ALL of your partnerships work? The session will resonate for all types of partnerships – vendor to reseller, reseller to reseller, and vendor to vendor relationships. Attend this session and you will:

- Hear the one thing to do before you start any partnership
- Discover the difference between acquaintances and partnerships
- Learn the two absolutes to make sure your partnerships will work . . . and last

Kent L. Hollrah - Orange Leap, Dallas, TX

Can Niche Marketing Really Make a Difference?

Many VARs struggle with marketing and feel they need to sell to everyone. They have a very hard time turning down business and don't really think there is any benefit to developing a niche. With the internet and the ability to sell globally, niche marketing is even more important – everyone looks the same when you visit their web sites, review their literature or listen to their sales pitch. It isn't just about picking the niche market but also about building integrations, having credibility when speaking to prospects and understanding a specific industry's pain points. At the conclusion of this session, participants will have the knowledge to help them determine if they should be marketing and selling to a niche market. In addition, they will understand the benefits, and be able to determine how to choose their niche market and build a plan on how to get started.

Maureen Okerstrom - Renovofyi, Fort Lauderdale, FL

Successfully Adding a New Product Line

As we strive to differentiate, many of our firms are considering adding new products and services to their portfolio. In preparation for this session, our ITA member firms were asked to participate in a survey related to adding a new product. This session will be a facilitated group discussion where members who have added new products will share their experiences and discuss some of the key issues, including:

- What investment is required to build a pipeline and close the first deal?
- What is the best staffing model – shift, redeploy, or hire new?
- What is required to achieve profitability on a new product line?
- What effect has adding a new product line had on your existing product offerings?

Shereen Mahoney - Brittenford Systems, Inc., Reston, VA
Kent L. Hollrah - Orange Leap, Dallas, TX

Metrics That Matter

One of the key benefits of ITA membership is the opportunity to benchmark your firm against your peers. However, we have struggled to get some of our ITA members to participate in our annual benchmarking study. ITA President Stan Mork and ITA's metrics "evangelist" Bob Gaby will lead this session where we will discuss and define what you, our members, believe are the most critical metrics for benchmarking. Our intent is to leave this session with 12 to 15 operational and financial metrics that will become the basis of the ITA Benchmarking efforts going forward. This is your opportunity to help identify the "Metrics that Matter" for our ITA member firms.

Robert Gaby - Arxis Technology, Inc., Simi Valley, CA
Stan Mork - ITA President, Minneapolis, MN

How Empowering Greatness in Others Will Allow You to Achieve Greatness Yourself

This session is designed especially for Principals, Owners, and Executives (POE's) who are looking for an extremely well researched and much targeted set of principles designed specifically for Value-Added Resellers and IT Consulting organizations that focus on delivering complex business solutions to Small-to-Medium Sized organizations. This three hour mini-workshop will focus on many very important POE responsibilities such as:

- The POE's responsibility as a role model and leader
- How to work "on" the business instead of working "in" the business
- An evolutionary approach to practice management in order to avoid the chaos of the revolutionary tendencies we all have
- Eliminating the "Curse of Exceptional People" and how this single cultural shift can give your organization a key competitive advantage
- Who and What are You – Really? Creating a business that is scalable, repeatable and has a value without YOU in it.
- Some strategies for hiring, incenting, managing and retaining the "right" people
- How YOU, as the POE, gum up the works on a daily basis!

Geoff Ashley - PROe, Bedford, NH

Solving the Mystery of Packing Your Pipe With Prospects

No matter what your business model, sound marketing and sales strategies are needed to generate business growth. This three hour mini-workshop, led by some of the ITA's best and brightest sales and marketing minds will focus on a variety of topics including:

- Getting your Marketing house in order
  - Developing your marketing inventory and determining where it fits in the marketing hourglass
  - The two layers of identifying ideal prospects
  - Developing your marketing action plan
- Driving high ROI activities to increase your pipeline
  - How can on-line search marketing improve your prospecting efforts?
  - How does your on-line presence help you find more potential customers by getting them engaged to provide their information with you?

- Building your business through increased referrals
  - How can I get more referrals?
  - How do I track referrals?
  - What are the gaps in my referral program and how do I improve accountability and effectiveness?

Joanne Black - No More Cold Calling, Greenbrae, CA
John J. Gabrys - Visions Business Solutions, Oak Park, IL
Amede Hungerford - NetSuite, San Mateo, CA
Dawn R. Westerberg - Dawn Westerberg Consulting, Austin, TX

TUESDAY CR BREAK OUT SESSIONS

Large Firm Special Interest Group

What's Happening in My Practice

Our large firm special interest group was formed to allow some of the members of our larger CR firms to meet at ITA to discuss specific issues relevant to a larger consulting and reselling firm. Although attendance is open to anyone, this group focuses on business issues that may be unique to larger, multi-location, multi-product line firms. For the Spring Collaborative, the Large Firm Special Interest Group will be using a "What's Happening in my Practice" format where we will have an open discussion on Tuesday to allow you to discuss topics that are on your mind. Some topics that have been suggested and may be discussed include opportunities during the economic upswing, hiring and retention, sales and marketing, new products and services, etc. Bring a couple of topics you want to discuss and take this opportunity to share ideas with your peers.

Edward Solomon, Moderator - Net@Work, New York, NY

Infrastructure Consulting Special Interest Group

What's Happening in My Practice

Our Infrastructure consulting special interest group was formed to allow our firms who have infrastructure, networking and managed services practices to meet at ITA to discuss specific issues relevant to their areas of interest. Although attendance is open to anyone, this group focuses on business issues that may be unique to consulting firms focused on providing IT infrastructure related products and services to the middle market. For the Spring Collaborative, the Large Firm Special Interest Group will be using a "What's Happening in my Practice" format where we will have an open discussion on Tuesday to allow you to discuss topics that are on your mind. Some topics that have been suggested and may be discussed include IT security services, managed services, disaster recovery, etc. Bring a couple of topics you want to discuss and take this opportunity to share ideas with your peers.

Chris Plachno, Moderator - CliftonLarsonAllen, LLP, Peoria, IL

INTERNAL TECH LEADERS (ITL) TRACK

ITL TACTICAL SESSIONS

Virtual Desktop (VDI) & BYOD: Revisiting VDI Options With the Increasing Demands of BYOD

Over the past several years, significant advantages from virtualizing nearly 100% of the data center have been realized. With the ever increasing demands of BYOD to the office, firms are confronted with the challenge of making their data and applications more easily accessible while maintaining a secure and manageable environment. There are a variety of VDI tools and technologies available to assist with these challenges such as Application Streaming, Desktop Streaming, Remote Virtual Desktop, Local Virtual Desktop, Application Virtualization, Session Virtualization, and more. Given the successes experienced with server virtualization, the question may not be if to virtualize the desktop, but how? In this session, Randy Johnston from K2 Enterprises will focus on the various technologies in the VDI space and which options work best in a given scenario. He will define each method of VDI, its advantages and disadvantages, and which technology is best suited for a given scenario.

Randy Johnston - K2 Enterprises, Hutchinson, KS

What's Happening in My Practice Roundtables

The roundtable sessions allow participants to collaborate on key technology initiatives, challenges, and concerns within their respective organizations. Participants will be divided into three or four functional groups (Applications, Infrastructure/Security, and Service Desk) and should come prepared to share within their group the top projects, priorities or challenges either in process or being planned for implementation in their firms.

Securing the Human: Developing Next Generation Security Awareness Programs

IT continues to implement controls to protect their firms, including firewalls, endpoint protection software and increasingly complex password requirements. However, our organizations continue to experience security incidents, often with our end users being the enabling factor. What behaviors need to be addressed in the next generation of security awareness programs? How should this training be delivered to help our workforces protect themselves and our firms? In this session, Lance Spitzner, a recognized leader in the field of cyber threat research and security awareness training, will provide an overview of how the SANS Institute has addressed this issue by developing a user security awareness framework called Securing the Human. He'll provide an overview of how this framework is being used in law firms, commercial industry, government agencies and education organizations to improve end user security awareness. At the end of this session, you will be provided an opportunity for your firm to gain complimentary access to the SANS Institute Securing the Human training materials in order to provide input to SANS on how this program could be tailored for the unique needs of our CPA firm members

Lance Spitzner - SANS, Bethesda, MD

Contract Risks in the New SaaS World: The Art and Science of Negotiating SaaS Deals

Large enterprises and even Fortune 100's are becoming increasingly comfortable with SaaS solutions. However, SaaS deals raise many complex legal issues that need to be thoroughly negotiated and documented in agreements. In this session Mark Grossman, an accomplished technology lawyer, will speak to the unique customs, usages, and norms of SaaS deals, and the particular provisions that are critical to agreements in this area. The discussion will include issues common to SaaS agreements including intellectual property, warranties, and limitations of liability.

Points to be covered include the following:

- Key provisions that should be included in every SaaS contract
- How limitation of liability clauses can emasculate SaaS agreements
- How to protect your data in the cloud
- How intellectual property provisions in SaaS agreements can be a trap for the unwary
- Strategies to keep SaaS agreements out of court
- Negotiating cloud and SaaS agreements that communicate the deal in clear, simple and unambiguous terms, reducing the likelihood of disputes

Mark Grossman - Tannenbaum Helpern Syracuse & Hirschtritt, New York, NY

CCH & Thomson Reuters Roadmaps – Town Hall Meeting

Our annual roadmap sessions with CCH and Thomson Reuters will be held as part of our Tuesday ITL agenda. We will be using a Town Hall format for these sessions. Using questions and topics supplied by the ITL CIO Community, each 45 minute session will be designed to allow both CCH and Thomson Reuters to specifically address the questions that our member firms have regarding their strategic initiatives and direction. **NOTE: Due to the vendor proprietary nature of the information being discussed during this session, our non-ITL members (Alliance Partners, Affinity Partners & Vendors to the Profession, Consultants to the Profession and Consulting & Reselling members) will not be admitted to this session.**

Matt Jagst - Director of Product Management, Enterprise Segment, Tax and Accounting Business - Thomson Reuters
Karen Abramson - President, CCH, a Wolters Kluwer business
Brian Diffin - CTO, CCH, a Wolters Kluwer business

What's Happening in My Practice Roundtables – The Drill Downs

In this follow-up session we'll discuss those topics generating the most interest from the initial break-out with the entire group. We may also discuss several topics that did not quite make the cut for a full ITA session. Potential topics include: The Microsoft Stack (Server 2012, Windows 8, Office 2013, SharePoint 2013, Lync 2013, Office 365), Client Portal Update, Recent GFR Service Issues. Please come prepared to contribute to the discussions!

Developing Roadmaps for Key Constituents: Tax, Assurance, Consulting

After this session you will be able to:

- Better understand how road mapping has been accomplished in other member firms
- Understand techniques and tools that work and do not work when working with the business to develop a road map plan
- Determine approval methods for projects submitted into Tax, Assurance, and Consulting roadmaps
- Formulate a strategy to illustrate and communicate the Technology plan throughout the Firm and begin driving the plan

Rob Lewis - McGladrey, Davenport, IA
Steven A. Noble - CliftonLarsonAllen, LLP, Minneapolis, MN

Managed Services Alternatives

With the large assortment of managed services available, it would seem there isn't anything that we're doing in IT that can't be managed by an outside service organization. But what's really working and what's not? In this panel discussion with IT leaders, each panel member will speak specifically about their evaluations of a variety of services, their costs, benefits, drawbacks, vendor choices, and why they decided for or against going forward with each service. After completing this course, you will be able to:

- Identify a number of available managed services currently in use amongst your peers today
- Implement methods for evaluating the viability and cost effectiveness of implementing managed services
- Identify some of the key limitations to implementing managed services

J.P. Reynolds - Cherry Bekeart, LLP, Richmond, VA
Allen Smith - Baker Tilly, Madison, WI
John Bowles - Dixon, Hughes, Goodman LLP - Henderson, NC

ITL STRATEGIC SESSIONS

Four Views of a Single Truth: How to Read, Speak and Persuade Any Audience

When the goal is to persuade your client or customer or peer to your point of view, what tools do you employ? Traditionally, professionals construct a logical argument, bring all the facts to bear and educate their audience—especially those individuals in the IT field. However, we know from cognitive science that this approach is only marginally effective. Better to ask the right questions, read your audience's communication or temperament style and speak their language. Utilizing the ECI (Eloqui Communication Index), Eloqui co-founders Deborah Shames and David Booth deliver the skills to effectively read and respond to each of the four communication styles. Having trained across all industries, Eloqui trainers understand when you identify and adjust to how someone responds in a dialogue, you can more quickly persuade them to buy-in. You will learn how to:

- Quickly identify and speak someone else's language
- Achieve buy-in for your idea, proposal, or new program
- Understand that we all come from different perspectives and there is no one "right" way
- Create strategic alliances with both like-minded people and those with different ideas

David Booth - Eloqui, Calabasas, CA
Deborah Shames - Eloqui, Calabasas, CA

Strategic Roundtables - 1

We will take those topics that received interest on the surveys, but not quite enough to warrant a full blown session and have each table discuss those topics. As always, you can add your own table topics. We will ask that each firm comment on what they would want to know about the topics and what they could provide in terms of expertise. Robust discussion is always encouraged!

Securing the Human: Developing Next Generation Security Awareness Programs

IT continues to implement controls to protect their firms, including firewalls, endpoint protection software and increasingly complex password requirements. However, our organizations continue to experience security incidents, often with our end users being the enabling factor. What behaviors need to be addressed in the next generation of security awareness programs? How should this training be delivered to help our workforces protect themselves and our firms? In this session, Lance Spitzner, a recognized leader in the field of cyber threat research and security awareness training, will provide an overview of how the SANS Institute has addressed this issue by developing a user security awareness framework called Securing the Human. He'll provide an overview of how this framework is being used in law firms, commercial industry, government agencies and education organizations to improve end user security awareness. At the end of this session, you will be provided an opportunity for your firm to gain complimentary access to the SANS Institute Securing the Human training materials in order to provide input to SANS on how this program could be tailored for the unique needs of our CPA firm members.

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Karen Abramson - President, CCH, a Wolters Kluwer business
Brian Diffin - CTO, CCH, a Wolters Kluwer business

Strategic Roundtables – 2

In our second set of roundtables, we will open up the discussion to be focused on specific items that may be on each CIO's mind that they didn't have time to discuss during the Monday roundtable session. This is your chance to pose specific issues you and your firms are facing and obtain input and feedback from your peers.

Business Intelligence and Big Data Strategies – Providing Useful Data and Gaining Adoption

A successful business intelligence implementation requires planning, a solid understanding of the business' needs with regard to analysis and metrics, and a plan for implementation, adoption and continued value that requires investments and dedication from both the business and IT. What do failed implementations have in common? What strategies have been proven effective? Come hear a professional services BI consultant talk about their experiences in all stages of BI implementations. At the end of the presentation portion of this session, we'll conduct an open discussion with the attendees about the status of their BI initiatives and what lessons our members have learned as a result of implementing these technologies. After this session you will be able to:

- Better understand what is needed in the upfront planning to ensure a successful plan is pulled together, who the key players should be and tips for executing the plan successfully.
- Understand the merits of current BI tools for performance management vs. predictive analysis vs. other uses
- Formulate a better strategy for driving adoption in your firm and where in your organization ownership of that initiative may see the most success
- See how other firms are approaching big data or cloud data in their BI strategies.

Chad Osgood - Premier Logic, Atlanta GA
Loren Eckart - Premier Logic, Atlanta GA

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J.P. Reynolds - Cherry Bekeart, LLP, Richmond, VA
Allen Smith - Baker Tilly, Madison, WI
John Bowles - Dixon, Hughes, Goodman LLP - Henderson, NC

NASBA Registry Information

Credit Hours: Up to 16 hours of CPE available.

Learning Objective: Depending upon the sessions you choose to attend, you will learn best practices and hear what other industry leaders are doing with respect to: current and emerging technologies, practice and project management, staffing, marketing, and customer/client service.

Program Content: The program will feature three tracks of educational content: IT Software Consulting (Sales, Support and Implementation), Internal IT for large CPA Firms, and IT Client Infrastructure & Managed Services Consulting. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member clients or their businesses to be more successful.

Fields of Study:
Business Management and Organization
Finance
Management Advisory Services
Marketing
Communications
Personal Development
Personnel/HR
Computer Science
Statistics

Level – Update
Prerequisites – Minimum 3 Years as an IT Consultant or Technician
Advance Preparation – None
Instructional Delivery Method – Lecture & Discussion

NASBA Registry of CPE Sponsors
Information Technology Alliance (#107740) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: **www.learningmarket.org**.

Administration
Records are maintained in accordance with CPE requirements. Questions, concerns or for more information regarding administrative policies such as complaint or refund should be made in writing to ITA Headquarters, 23940 N. 73rd Place, Scottsdale, AZ 85255-3425, Telephone (480) 515-2003.